

**A QUALITATIVE EVALUATION OF
THE CURRENT STATE OF BILLBOARD
MEDIA ADVERTISING IN MALAYSIA**

WONG LEE SA

**A Thesis Submitted to Asia e University in Fulfillment
of the Requirement for the
Degree of Doctor of Philosophy**

ABSTRACT

Billboards have increasingly become an important element in media plans and advertising campaigns. Despite the increase of attention by advertisers, outdoor media has been “one of the least researched of any mass medium” (Katz, 2014). In Malaysia, the outdoor industry faced challenges from the lack of regulations by the local state councils and increased in illegal billboards. Guided by two theoretical frameworks – Media Richness Theory and Hierarchy of Effects Model, this doctoral research aimed to examine the current state of billboard media measurement in Malaysia, discuss and analyse the challenges, limitations, the role of billboard media and current ways billboard was being measured as an advertising medium. As previous researches have only provided various statistics of outdoor advertising in Malaysia, this research took a different perspective to deploy only qualitative methods– focus group discussion, in-depth interviews and textual analysis to provide depth and understanding. Research findings revealed that there were additional challenges faced by outdoor industry stakeholders in Malaysia. The lack of regulations by the local government has led to other repercussions and irregularities among industry players, which was the main reason behind the lack of standard outdoor media measurement for billboard and other outdoor medias in Malaysia. This research also achieved an important discovery of a mix for billboard media planning in Malaysia – The OBILTA Mix. The mix consists of five variables – objective, location, budget, image and target audience which emphasized on the importance of the objective of a billboard media campaign as it placed a huge influence for media planners to plan for the location, budget, image that targets the audiences identified for the campaign. The OBILTA mix is the first for the billboard industry and also outdoor media in Malaysia.

APPROVAL PAGE

I certify that I have supervised /read this study and that in my opinion it conforms to acceptable standards of scholarly presentation and is fully adequate, in quality and scope, as a thesis for the fulfilment of the requirements for the degree of Doctor of Philosophy.

Prof Dr Lim Kok Wai Benny
Adjunct Associate Professor
The Chinese University of Hong Kong
Supervisor

Examination Committee:

Assoc Prof Dr Goi Chai Lee
Associate Dean, Research and Development
Curtin University Sarawak Malaysia
Examiner

Assoc Prof Dr Ser Shaw Hong
Vice-Chairman, Faculty of Communication Arts
Chulalongkorn University
Examiner

Assoc Prof Dr Mohamed Nasser Mohamed Noor
Academic Fellow, School of Management
Asia e University
Examiner

Prof Dr Siow Heng Loke
Dean, School of Graduate Studies
Asia e University
Chairman, Examination Committee

This thesis is submitted to Asia e University and is accepted as fulfilment of the requirements for the degree of Doctor of Philosophy.

Prof Dr Juhary bin Ali
Dean, School of Management
Asia e University

Prof Dr Siow Heng Loke
Dean, School of Graduate Studies
Asia e University

DECLARATION

I hereby declare that the thesis submitted in fulfillment of the PhD degree is my own work and that all contributions from any other persons or source are properly and duly cited. I further declare that the material has not be submitted either in whole or in part, for a degree at this or any other university. In making this declaration, I understand and acknowledge any breaches in this declaration constitute academic misconduct, which may result in my expulsion from the programme and/or exclusion from the award of the degree.

Name of Candidate: Wong Lee Sa

Signature of Candidate:

A handwritten signature in black ink, appearing to read 'Wong Lee Sa', written in a cursive style.

Date: 20 May 2020

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DEFINITION OF TERMS

Advertiser / Client:	Key participant in an integrated marketing communication process where they have the products, services or cause to be marketed. They also provide funds that pay for advertising and promotions.
Advertising Objective:	Advertising objective is the communication goal of any paid form of communication targeted at a specific defined audience in a given period of time.
Billboard:	Billboard is a type of outdoor advertising designed on a large flat surface where advertising visuals are posted, usually situated at the side of the road.
Bodycopy:	Bodycopy is the textual component of an advertisement and tells a more complete story of a brand.
Creative Agency:	Comprises of advertising specialists like the art director, creative director and artists that is in-charge of the artistic and creative direction of an advertising campaign.
Media:	The collective form of many different mediums, the main means of mass communication forms like television, radio, newspaper and outdoor.
Media Agency:	Comprises of media specialists like the media planners, media buyers and media researchers that is in-charge of planning, development, placement, and evaluation of advertising campaigns.
Media Buyer:	An advertising professional who is tasked to buy media space specified by the media planner.
Media Measurement:	Ways to measure the competency and effectiveness of advertising in media
Media Owner:	Media companies that owns and sells media space (this refers to print, digital, electronic and out-of-home media).
Media Plan:	A document, which contains media objectives, strategies, media schedule and media mix targeted at a set of target audience.
Media Planner:	Advertising professionals who plan in what media advertising should be placed in order to optimally reach a specified target market within a specified budget.

Media Schedule:	A schedule comprises of media time and media space planned by media planners. Media buyers refer to this schedule to purchase media space.
Medium:	A medium is any specific channel of communication from sender to receiver.
Out-of-home media:	A category of non-traditional advertising that reaches a message recipient while he or she is outside the home such as billboards, bus and taxi advertising, and cinema advertising.
Outdoor media:	A subcategory of out-of-home media, referring specifically to billboards, street furniture (e.g., bus benches, bus shelters, newsstands, kiosks), transit (e.g., airport, rail, bus), and alternative (i.e., ambient) media.

CHAPTER 1 INTRODUCTION

1.1 Definition of Advertising – A Discourse

The significance and true meaning of advertising varies among different parties. To the consumers, any promotional method that attempts to influence is a form of advertising. To business owners, advertisers, marketing and advertising practitioners, the different types of promotional techniques are extremely significant. Public relations, direct mail, TV advertisements, on-ground events, product sponsorships are different elements that is part of a marketing communication mix.

There are a few variances to define advertising by different scholars. Advertising is not marketing. Advertising specialist, David Ogilvy, defined advertising as “not as a form of art of entertainment, but as a medium of information” (Fill, Hughes & Francesco, 2013). The definition of advertising consists of several key ideas – paid; non-personal communication and targeted (Belch & Blech, 2016; Bird, 2012; Chan, 2006; Frith & Mueller, 2010; Kaplan, 2012; Kelley & Jugenheimer, 2008; Ogden & Richards, 2010; Rodgers & Thorson, 2012).

Advertising is any ‘paid’ form of communication about an organization, product, service, or idea by an identified sponsor. The term ‘paid’ used in this context reflects that all forms of bought advertising. Thus, advertisers have full control of the content and placement of the ad. All advertising messages seen on any kind of paid medium are considered a form of advertising.

Advertising is also conventionally regarded as a form of ‘non-personal communication’ where no immediate feedback can be obtained, except direct mail. This can only be applied to mass mediums like television, newspaper, radio and outdoor advertising spaces. With vast digital and online advertising available today, immediate feedback is increasingly possible. Advertisers would be able to engage with their consumers. Besides that, ‘non-personal’ also refers to advertising that communicates to a large group of people. Advertising can also be placed in various mediums to reach the correct set of audiences. Different forms and visuals therein transfer messages to targeted audiences.

Advertising is ‘targeted’ as each advertising space that is paid by the advertisers aims to achieve a set of objectives. Although the basic purpose of advertising is to inform, persuade, and/or remind customers of business and organizational offerings, which can be in the form of either a service or a product, the main goal of advertising is to persuade. It is a form of salesmanship of persuasions to sell, to encourage or try to make consumers desire or buy a service or product. Though, the twenty-first century scholars and books have argued that the goal of advertising in the society today, is more about building relationships and trust with consumers and its target market. On top of building relationships, advertising consists of embedded messages that signifies the cultural roles and values that defines.

1.2 Elements of Advertising

Advertising is a promotional mix, which consists of direct marketing, interactive or known as internet marketing, sales promotion, public relations and personal

selling (as shown in Figure 1.1 below). Each element of the promotional mix plays an important role in an integrated marketing communication (IMC) program¹.



Figure 1.1 Elements of Promotional Mix (Belch & Belch, 2016, p. 18)

¹ IMC is defined as the planning and execution of advertising and promotional messages selected for a brand, service or company that aim to meet a set of communication objectives. IMC consist of promotional tools like public relations, direct marketing, advertising, sales promotion, Internet marketing and personal direct selling (Belch & Belch, 2016).

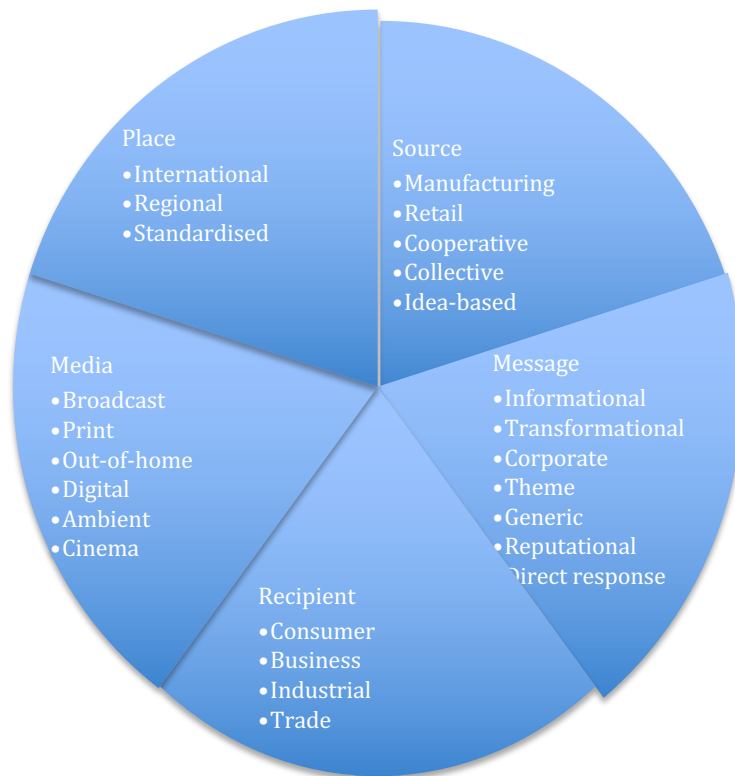


Figure 1.2 Types of Advertising (Fill, Hughes & Francesco, 2013, p. 18)

Fill, Hughes and Francesco (2013), and Adams and Galanes (2015) categorized advertising in five perspectives – source, message, recipient, place and media (as shown in Figure 1.2). The sender of a message results in different forms of advertising. For example, retailers will use retail advertising to promote new products while a non-profit organization will use idea-based advertising refers to campaigns derived from a creative idea. For example, Coca-Cola may utilize their vending machines to spread awareness on recycling by allowing consumers to place used Coca-Cola cans back into their machines. The message will provide different forms of advertising. Informational advertising uses messages to promote information about the attributes of a product or service, while transformational advertising uses messages that are emotional to influence and change the way an individual would feel about a product. According to Pearson et. al. (2017)

institutional or corporate advertising are used by organizations to promote their organizational values and intentions. Theme advertising is a specific type of recruitment advertisement by advertisers, while generic advertising are messages sent out by organisations to promote a specific product category like shampoo or body soap. When companies are experiencing a crisis, companies would most likely send messages to build goodwill and relationships via reputational advertising. Reputational advertising are a type of advertising that promotes a more positive front of the brand and company to show that they care on building or maintaining relationships with their customers. Last but not least, direct response advertising is used to provoke by sending call-to-action messages. The recipient of advertising messages will also define the different messages that could be sent out, be it consumers, businesses, industrial or trade.

Other than that, advertising can also be categorized based on the different mediums used to carry the message or by place. Ogilvy (2013) mentioned that advertising is categorized by broadcast mediums like television and radio, print and out-of-home medium like billboards, digital, ambient advertising and cinema. This is because each element in different mediums looks into different requirements. As a whole, advertisements on television and radio focus a lot on storylines to capture the attention of audiences. However, the integral element that makes good advertisement on radio is good sound; print advertising such as magazine and newspaper focuses a lot on bodycopy; out-of-home advertising has its advantages in terms of a wide reach but short viewership for each exposure.

Lastly, advertising can also be categorized by place – national, international, standardized or adapted. National, international and standardised advertising are

messages used in all countries and regions while adapted advertising is where the message is altered to reflect local needs and customs (Kolb, 2015; Poonia, 2010). Today, international brands create adapted advertisements to suit local needs as it is proven that consumers will have positive brand impressions and purchasing decisions are created when there is consumer relevance (consumers being able to relate to the brand).

1.3 Out-of-home Media – The Foreword

Out-of-home advertising, or also known as outdoor advertising, is not always the glamorous, high profile way to advertise in advertising campaigns (Surmanek, 2016). Outdoor mediums are seen as a common supplementary medium in a media plan. Billboards, in particular, is considered one of the ways to reach targeted consumers outside their homes, where above-the-line media like television, newspapers and radio could not cover.

Outdoor media is the only media among all traditional media – print, radio and TV, that aren't affected by media digitalization (Katz, 2014). Despite the slight decline in the global outdoor advertising spend in the year 2014, outdoor media has continuously been on the rise in terms of advertising expenditure, digitalization of billboard, increased investment in creativity and an expansion of different types of mediums under the outdoor media category. – billboards, posters, street furniture, airport and transport.

For many years, the biggest advertisers have always been the cigarettes and liquor industry. Despite the ban in advertising for liquor and cigarette brands in the

United States due to increased awareness on health implications, billboard advertising remains profitable and is on the rise. According to Surmanek (2016), the Institute of Outdoor Advertising (IOA) in New York City reported a gross billboard revenue totaling USD\$1.5 billion in year 2012 and growing to USD\$2.1 billion in year 2014. Taylor et al. (2015) also stated that annual revenues were USD2.4 billion in 2013 and have reached a grossing USD4.4 billion in 2014. One of the largest media agencies in Malaysia – Zenith Optimedia projected in 2013 on the continued growth in outdoor advertising expenditures.

1.4 Problem Statement

The Malaysia outdoor industry constantly faces gaps and loopholes in outdoor media regulations. Most illegal billboards that have been taken down by local councils were also due to billboard structures that were not approved by the local state councils. This caused large implications on traditional (static) billboards as it did not only disappoint advertisers but also affected the confidence in the industry as a whole. Besides that, Low (2015) states that the Malaysian outdoor media specialists faces difficulty in convincing advertisers on its media value due to the lack of data for media measurement. It is similarly reported by Mahalingam (2015) and Malaysia Advertisers Association (2016) that the challenges weigh more on traditional billboards as digital billboards rely on other online data that could be retrieved by media owners.

The billboard industry in Malaysia faces issues in government regulations, lack of data for billboard media measurement in Malaysia. Traditional (static) billboards faces larger challenges and implication as it relies on data for reviews post-

advertising campaign. The lack of government regulations have also affected advertisements on traditional billboards when taken down by local councils.

1.5 Research Objectives

This doctoral research aims to examine the current state of billboard media measurement in Malaysia, discuss and analyse the challenges, limitations, the role of billboard media and current ways billboard is being measured as an advertising medium.

In order to achieve this aim, this research pilots discussions and interviews with industry stakeholders to deconstruct the challenges and limitations faced for billboard advertising campaigns. Analysis will be done on the issues discussed to provide in-depth understanding on the current state of billboard media measurement in Malaysia. As billboard visuals play a significant role in billboard advertising, analysis will also be done on billboard visuals.

This research only studies traditional static billboards as digital billboards has different sets of traits as an advertising medium and considerations for media measurement (Katz, 2014). It is not the focus of this research to create a new media measurement for the billboard media measurement in Malaysia.

1.6 Research Questions

This research aims to contribute to enhance the understanding of the current state of billboard media advertising in Malaysia by answering the following research questions: -

1. What is the current state of outdoor billboard industry in Malaysia, the challenges and limitations faced by media stakeholders in making decisions for advertising campaigns?
2. What are the issues faced by the billboard industry in Malaysia in obtaining data for the process of media planning? How does the issues affect the deployment of billboard media measurement tools in Malaysia?
3. What are the common variables used by current industry stakeholders to measure billboard advertising campaigns?
 - 3.1. How does billboard visuals play a role in billboard advertising campaigns?
 - 3.2. How are these practices similar or different to current scholarly discussions on outdoor media measurement?

1.7 Theoretical Framework

Theories are a set of systemic ideas that help make sense of a phenomenon, guide action or predict consequences (Taylor et al, 2015). Grant and Osanloo (2014) describe the theoretical framework as important as a blueprint of a house. It sets the structure to support the rationale of the research and keep it in perspective. Theoretical frameworks also provide researchers with different approaches to a topic that could be explored by different researchers. This provides a variety of depths that benefits researchers and scholars (Strayhorn, 2013). Selecting a